

F\$M
1Q ALL HANDS

F\$M

March 13, 2013

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Welcome & Introductions

F\$M Delivers

Vastly improved quality and access to financial data essential to effective research management

High value, end-to-end OCFO services (e.g. Procurement) that are delivered promptly, efficiently and transparently

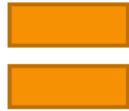
OCFO operational efficiency that maximizes dollars directed to Science

Solution to mitigate institutional risk related to:

- Financial Compliance
- Cost Growth
- Technical Obsolescence (16 year old system based on LLNL architecture)

Project Governing Principles

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Satisfy core business requirements

- Meet the core needs of the LBNL business models

Simplicity

- Simplify business processes, information structure and related business rules

Standardization

- Standardize business processes

Information accessibility

- Deliver and present information easily to end users

Data Integration

- Ensure data is integrated across systems

Limited customizations

- Optimize use of delivered system capabilities

Usability

- Optimize usability (ease of use and system performance) to promote system adoption.

Agenda

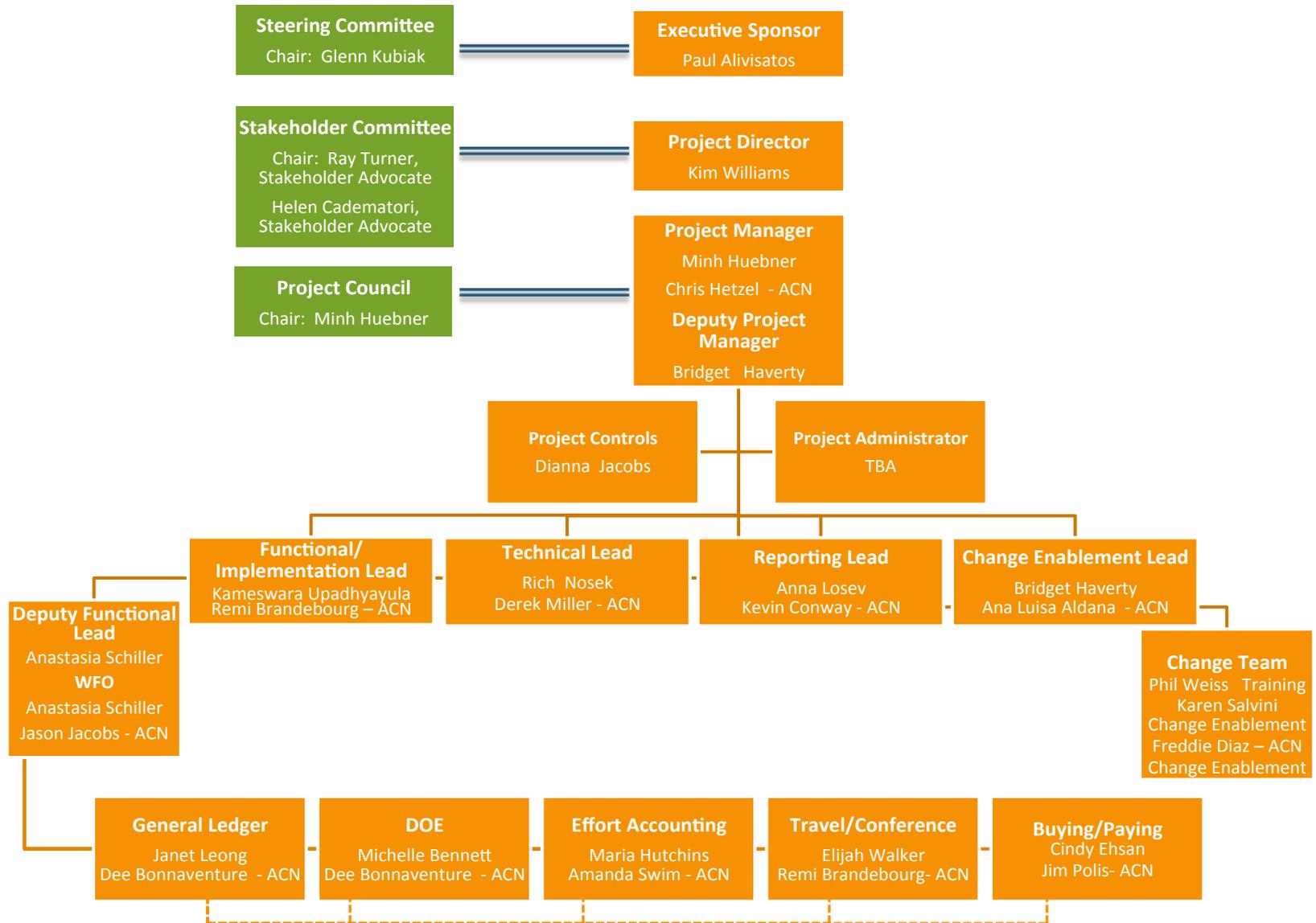
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Welcome	10:00 – 10:10
<ul style="list-style-type: none">• Introduction from the Project Director• Introduction of New Team Members	
Project Update	10:10 – 10:25
<ul style="list-style-type: none">• Overall Project Analyze/Design Status• Workstream Achievements/Milestones<ul style="list-style-type: none">• Functional• Technical• Reporting• Change Enablement	
Service Area Teams Kickoff	10:25 – 10:45
F\$M Change Network	10:45– 11:20
Break	11:20 - 11:25
Team Building Activity	11:25 – 11:50
Q&A	11:50 – 12:00

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Project Update

F\$M Project Organization Structure

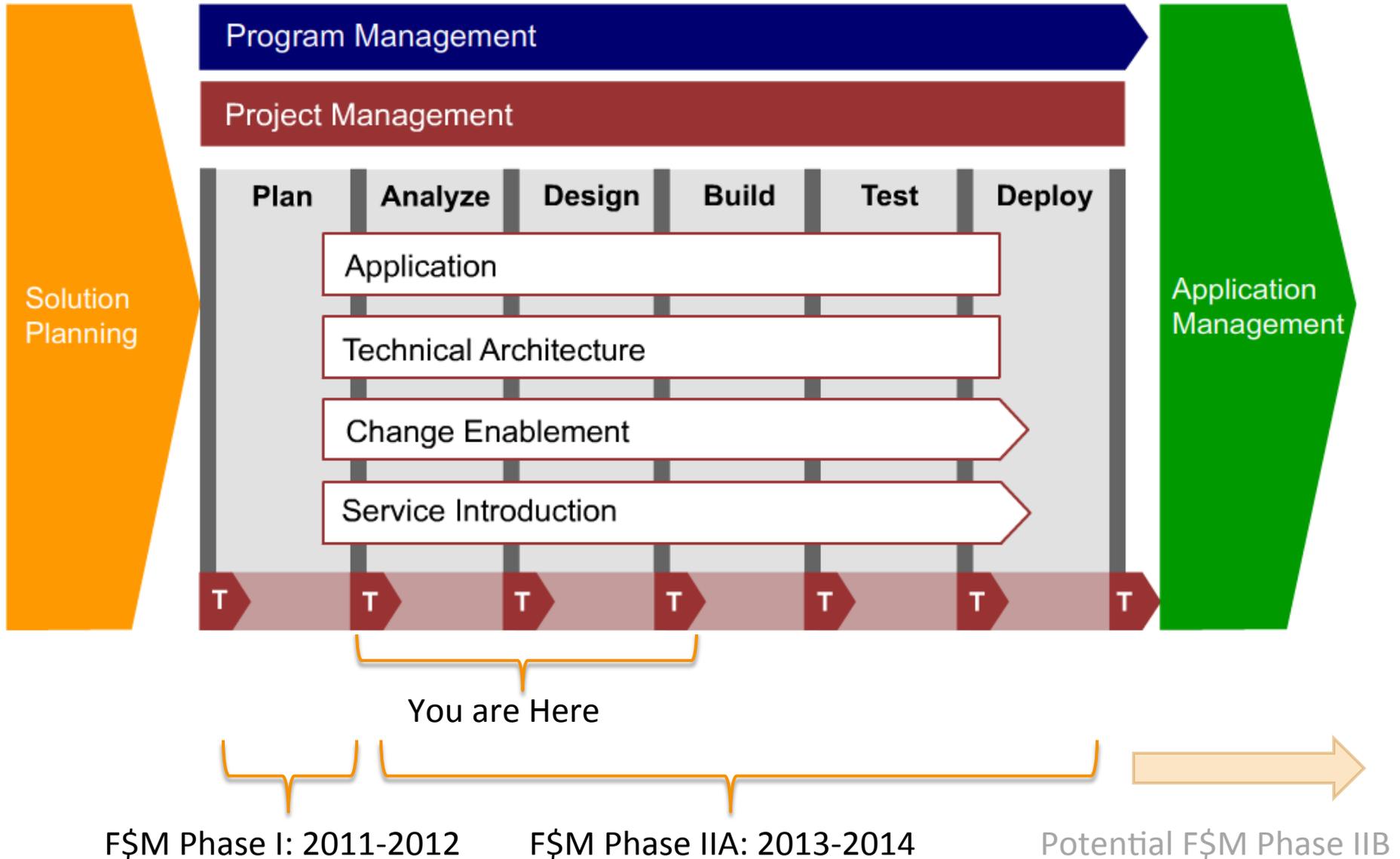


Project Phase II-A Milestone Overview

	2013												2014											
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12
Phase II-A - Core Finance	<i>Phase I-A</i>																							
Milestone 1: Global Design for Phase IIA and II-B* (7/7//13)	M1																							
Milestone 2: Project Plan (7/7/13)	M2																							
Milestone 3: System Design (8/31/13)							M3																	
Milestone 4a: System Development (1/31/14)									M4a															
Milestone 4b: System Testing (6/30/14)													M4b											
Milestone 5: Training & ERP Go-Live (10/1/14)																			M5					
Milestone 6: Final Completion** (11/30/14)																							M6	

Project lifecycle

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Analyze & Design Phase

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- Analyze Activities:
 - ▣ Identify business requirements
 - ▣ Review “off-the-shelf” capabilities of PeopleSoft
 - ▣ Fit/Gap: Identify gaps based on needs analysis from Plan Phase
 - ▣ Design the new processes using flow diagrams & narrative

- Design Activities:
 - ▣ Develop the General Design - Design software to meet process needs, including:
 - PeopleSoft configuration for both Phase IIA and Phase IIB
 - Customization needs for Phase IIA only
 - ▣ In total, called “Global Design”, due 7/5

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Service Area Teams Kickoff

Service Area Team Selection

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Selection Guiding Principles

- Do not over subscribe any one team member
- Do not overly tax any one division
- Represent all the business models across the teams
- Allow team members to charge the F\$M project

Selection Criteria

- Deep knowledge
- Service recipients that are influencers/change champions
- Long term lab knowledge **and** new perspectives
- Represent the **Critical** aspects of the service line
- Represent all of the Lab's business models
- Strong communication skills
- Include Business Systems Analysts
- Actively use SMEs as needed to keep core team small

Service Area Teams

Kicking off 3/13

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- Service Area Teams
 - ▣ Ensure tactical Lab-wide engagement and support
 - ▣ Create dialogue with representatives throughout the Lab
 - ▣ Ensure F\$M design is grounded in the Lab's Business Model reality
 - ▣ Each Service Area has a Lead supported by a Working Group & network of Subject Matter Experts
- Reporting Team – has an additional layer to ensure that Reporting efforts are integrated across the service areas

Service Area Workgroup:

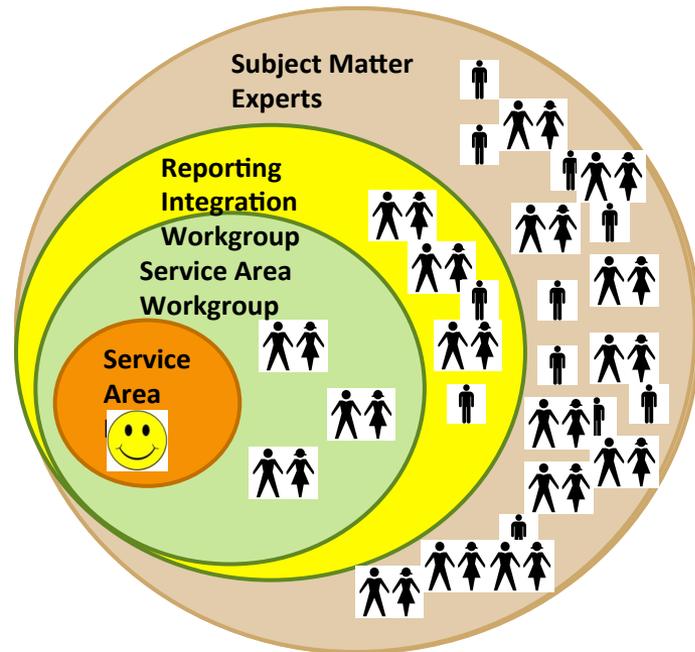
- Cross functional mix of Field Ops, Central OCFO, Admins, others
- 5 to 7 members
- @ 25% FTE commitment (average – will vary over time)

Reporting Integration Workgroup:

- Includes 1 member from each of the other Service Areas
- Member provide integration between the other Service Area Workgroups and the Reporting Workgroup
- Time commitment is not additive to the estimated @25%

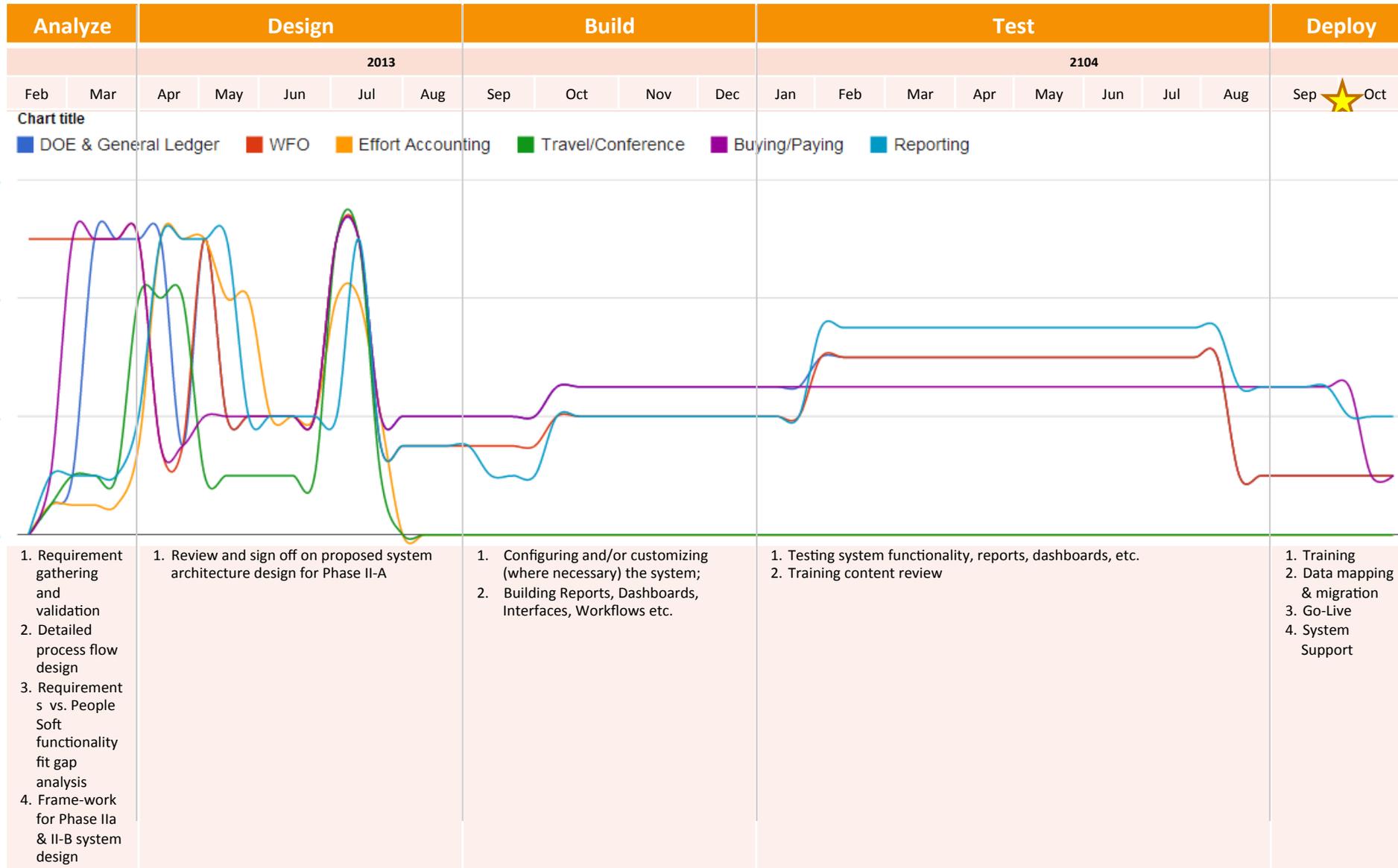
Subject Matter Experts:

- From across Lab or external
- As many as needed to adequately support the Service Area
- Called on as needed for consultation and to review proposed design
- Because the impact of reporting is widespread this is the largest SME group



Service Area Workgroup Time commitment

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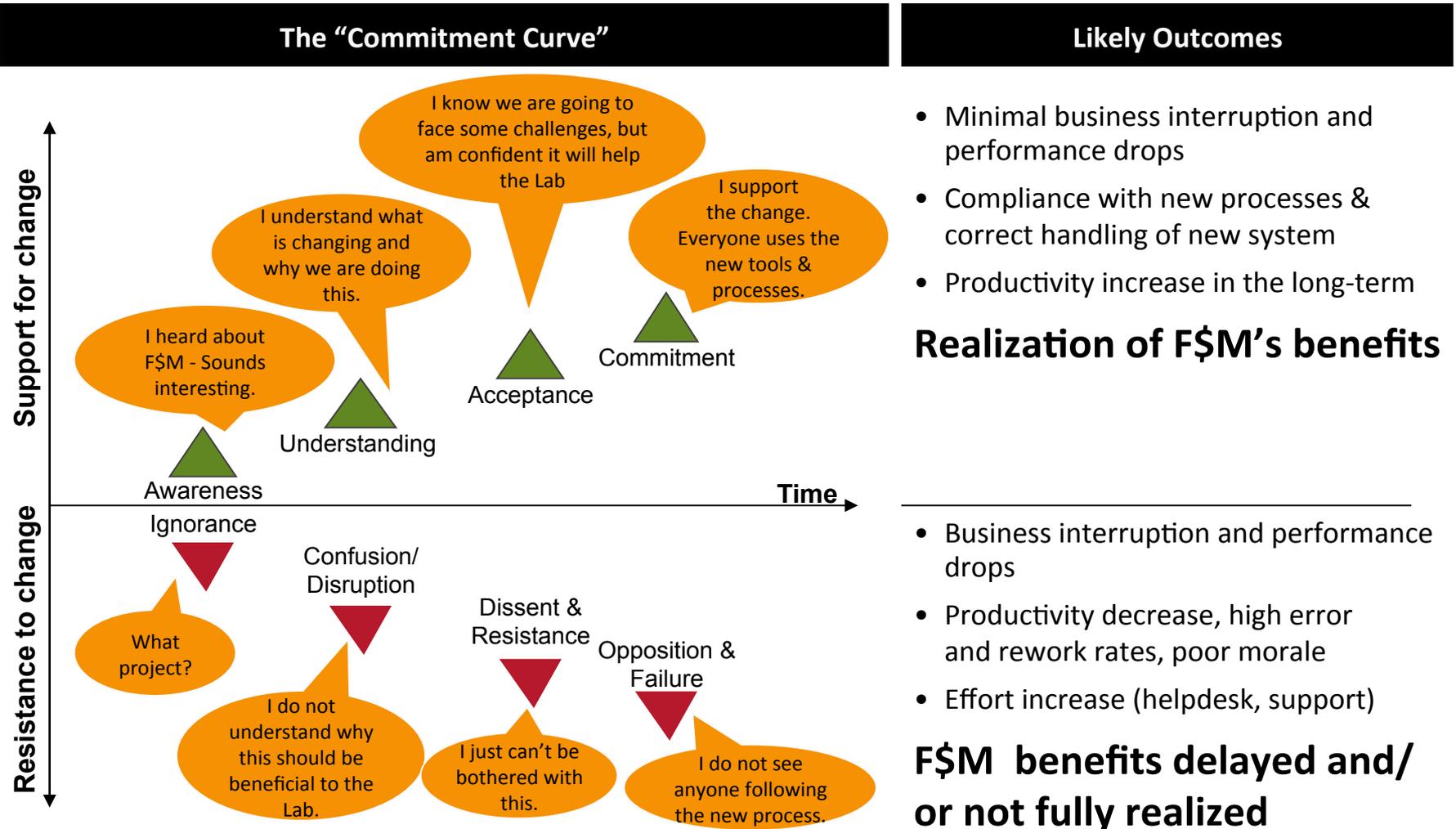
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Change Network

The Commitment Curve

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If Stakeholders Do Not Support the Change, F\$M's Benefits Cannot Be Realized:



The F\$M Change Network

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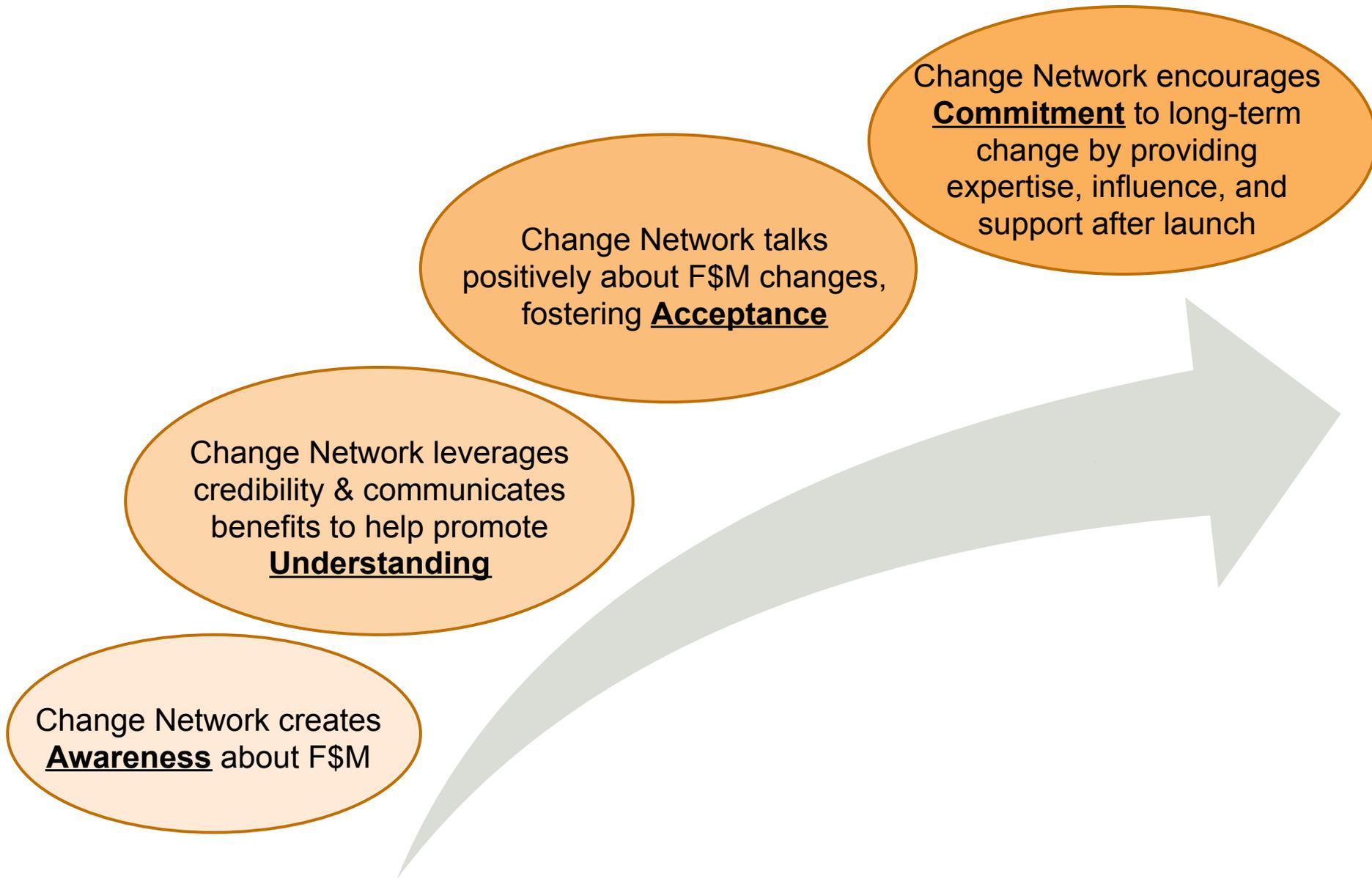
The F\$M Change Network is comprised of key stakeholder groups whose members are at various organizational levels and spread across divisions and departments at the Lab.

Purpose

- Help prepare the Lab for F\$M, encouraging the community to embrace F\$M in an effective & timely way
- Provide advice & support for a smooth implementation

The Commitment Curve and the Change Network

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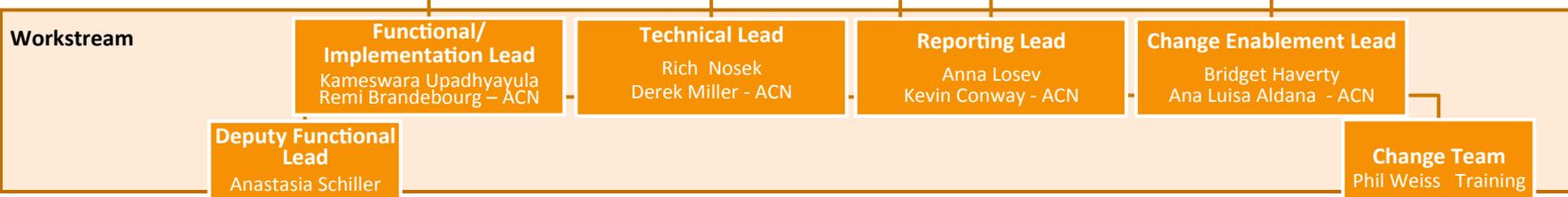
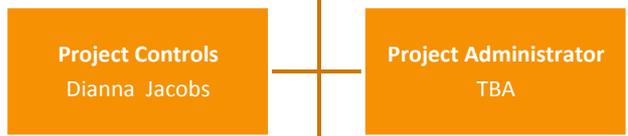
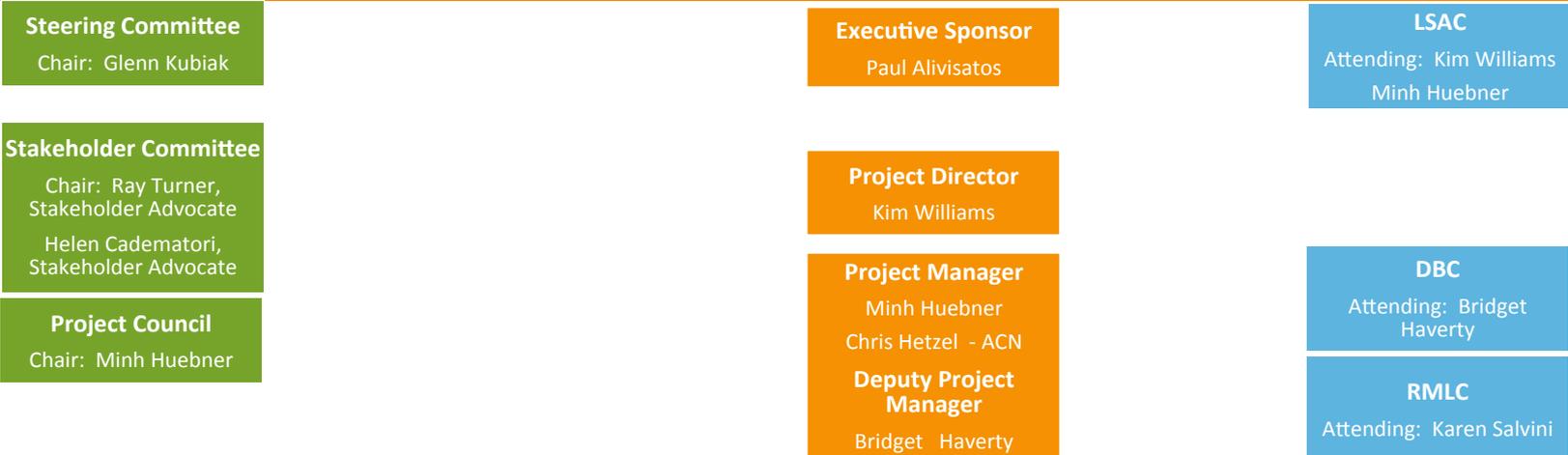
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Change Network Organization

Change Network Structure and Alignment

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Strategic



Tactical

Steering Committee

Meets Monthly, First week of the Month

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- Management representatives from key organizations with interest in project oversight, control, outcome
- Vocal & visible project champions across own organizations & lab-wide
- Advisory to the Executive Sponsor, Committee Chair, & Project Team
- Provide direction, guidance, issue resolution, policy decisions
- Members:
 - Chair: Glenn Kubiak, COO
 - Horst Simon, Deputy Lab Director
 - Kathy Yelick, ALD for Computing Sciences
 - Ray Turner, Deputy Div. Dir. for Ops, JGI
 - Rosio Alvarez, CIO
 - Vera Potapenko, CHRO
 - Kim Williams, CFO

Stakeholder Committee

Kicked off 3/1, Meeting Monthly

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- **Stakeholder Committee Characteristics:**
 - ALD Area committee members will represent the needs of all the divisions within their Area
 - Mixture of senior scientific and operations leaders
 - Stature, capability & willingness to execute role
 - 2-way communication

Name	Individual Role	Org	Area/Div
Jonathan Carter	Scientist	Sci	CS
Bill Fortney	Operations	Sci	CS
Paul Adams	Scientist	Sci	BioSci/PBD
Ray Turner Chair	Operations	Sci	BioSci/JGI
Helen Cademartori Vice Chair	Operations	Sci	BioSci/LSD
Mary Sidney	Operations	Sci	E&E/EETD
TBA	Scientist	Sci	E&E/TBA
Jerry Kekos	Operations	Sci	ALS
John Freeman	Operations	Sci	GS/ENG
Tony Spadafora	Scientist	Sci	GS/PH
Jim Dahlgard	Operations	Ops	OPS/FAC
Gita Meckel	Operations	Ops	OPS/EHS

Project Council

Meets Every Wednesday @ 11:00 AM

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A 'Kitchen Cabinet' working as a collaborative and productive advisory council to the Project Management Office.

Responsible for supporting successful accomplishment of project objectives across all aspects of scope, including financial stewardship, services, and information, and the delivery of tools necessary for efficient and effective operations.

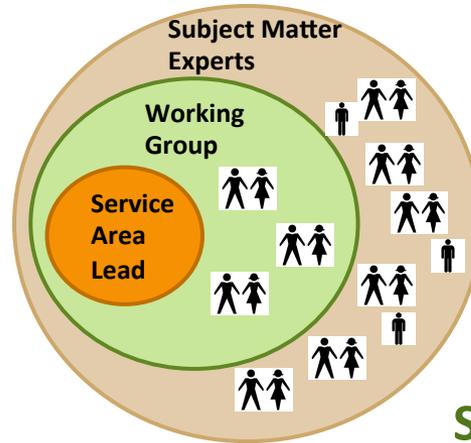
Members:

- ▣ Rachelle Jeppson, Controller
- ▣ Rebecca Cornett, Chief Procurement Officer
- ▣ Charles Axthelm, Business Systems Manager
- ▣ Kim Williams, Chief Financial Officer
- ▣ Mark Dedlow, IT Business Systems Manager
- ▣ Ray Turner, Deputy Div. Dir. for Ops, JGI, Stakeholder Advocate
- ▣ Helen Cademartori, Deputy Div. Dir. for Ops, JGI, Stakeholder Advocate

Example: WFO Service Area Team

Service Area Leads: Anastasia Schiller/Jason Jacobs

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Working Group Members:

- Robert Gutierrez, Resource Analyst
- Kathy Dean, Resource Analyst
- Anastasia Schiller, F&M Lead
- Angela Ford, Contracts Officer
- Victor Lorincz, Accountant
- Parth Banker, Systems Analyst
- Kristi Shaw, Resource Analyst

Subject Matter Experts:

- Christy Bertoldo, Resource Analyst
- Sonia Ortiz, Business Mgr
- Viviana Wolinsky, Tech Transfer Deputy
- Lechieta Williams, Proposal Specialist
- Lee Haynes, Resource Analyst
- Manfred Auer, PI
- Sally Nasman, Proposal Specialist
- David Garcia, Contracts Officer
- Nick Skowronski, Financial Analyst
- Kimmy Cheung, Accountant
- Angela Huang, Tech Transfer Accountant
- Shiela Dixon, Resource Analyst
- Karen Omoto, Resource Analyst
- Mark LaBarge, PI

Example by Division/Department: EETD Participants

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Working Group Members:

- Kathy Dean, *WFO, Reporting & Data Analysis*
- Deb Connell, *Buying & Paying*
- Susan Lauer, *Travel & Conferences*

Subject Matter Experts:

- Rachel Walton, *Buying & Paying*
- Micah Liedeker, *Buying & Paying*
- Lechieta Williams, *WFO*
- Paul Mathew, *DOE Funds & General Acctg.*

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Change Network Key Activities

Summary of Objectives and Involvement Activities for F\$M Change Network Group

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	Steering Committee	Stakeholder Committee	Project Council	Service Area Workgroup	Service Area SME's
Advocacy					
Talks positively and openly about F\$M . Demonstrates grassroots buy in	<input checked="" type="checkbox"/>				
Advice / Insight					
Receives early demonstrations of system; influence training and communication activities				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Responds to high-level change impacts to help tailor change activities and messaging		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Responds to detailed change impacts to help tailor change activities and messaging				<input checked="" type="checkbox"/>	
Review / Feedback					
Provides input/advice on plans for managing change across the business	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Provides feedback/advise on tailoring the blend of communication activities for a business function		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Reviews communications, training and delivery methods for their division/department		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Education / Expertise					
Provides perspectives from previous change experiences; what worked well/didn't		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	.
Coach and train others at their location				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Provides department specific information for go/no go decision				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Participates in focus groups, training/ system pilots				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cascade communications to their group/location		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Implementation / Ongoing Support					
Provides hands-on support during deployment				<input checked="" type="checkbox"/>	
Serves as local subject matter expert to answer questions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedback to the project team on effectiveness of change activities		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Participate in User Satisfaction Survey	<input checked="" type="checkbox"/>				

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Break

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Team Building

Networking Bingo!

Only one name per space (can't dup)

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Find someone on the F\$M team who has volunteered in the past month	Find the Accenture F\$M Technical Lead	Find someone on the F\$M team who owns a pet
Find a member of the F\$M team who plays a musical instrument	Find a member of the F\$M team who is a Scout Leader (Boy or Girl Scout)	Find someone on the F\$M team who is fluent in more than one language
Find the Accenture F\$M Project Manager	FREE  SPACE	Find the LBNL F\$M Change Enablement Principal
Find someone of the F\$M Team who is left handed	Find a member of the LBNL F\$M project team who has been at the lab over 20 years	Find someone on the F\$M team who shares the same birthday month as you
Find the LBNL F\$M Project Director	Find the member of the Accenture F\$M team with the longest commute	Find someone on the F\$M team who has travelled to at least three different continents



WHAT IS F\$M?

The Financial Systems Modernization project will contribute to Berkeley Lab's strategic goal of a Safe and Efficient Lab by delivering:

- Vastly improved quality and access to financial data essential to effective research management
- High value, end-to-end OCFO services (e.g. Procurement) that are delivered promptly, efficiently and transparently
- OCFO operational efficiency that maximizes dollars directed to Science
- Solution to mitigate institutional risks related to Financial Compliance, Cost Growth, and Technical Obsolescence

MEET THE LEADERS OF THE F\$M TEAM



Project Director: Kim Williams
Office of the Chief Financial Officer –
Chief Financial Officer



Project Manager:
Minh Agon Huebner
Office of the Chief Financial Officer –
Deputy Chief Financial Officer



Deputy Project Manager:
Bridget Haverty
Office of the Chief Financial Officer

WHAT'S NEW AT F\$M?



F\$M Phase II officially kicked off on February 4, 2013. The project team is located in the mezzanine of Building 971 at 6401 Hollis St., Emeryville.

Contact The Team:
fsmteam@lbl.gov



The F\$M project is supported by a diverse LBNL team alongside our consulting partners from Accenture. View the F\$M Org Chart & Team [here](#).



A word cloud of thank-you phrases in various languages. The most prominent text is "THANK YOU" in large, bold, black capital letters. Other visible phrases include "GRACIAS", "ARIGATO", "SHUKURIA", "JUSPAXAR", "TASHAKKUR ATU", "YAQHANYELAY", "BIYAN SHUKRIA", "TINGKI", "SUKSAMA", "EKHMET", "GRAZIE", "MEHRBANI", "PALDIES", "GOZAIMASHITA", "EFCHARISTO", "KOMAPSUMNIDA", "MAAKE", "MERCY", "MERTAJI", "MERMOMCHAR", "BOLZIN", and "MERCY". The words are arranged in a roughly rectangular shape, with "THANK YOU" being the largest and most central.